



A First Look at EPA's Portfolio Manager Upgrade

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Thanks for Joining



Web Conference Tips

Hold & Music

Please **DO NOT** *put your phone on hold* during the session.

Technical Assistance

Call 1-866-229-3239 if you need technical help.

Presentation Slides

Presentation slides will be sent to all participants and posted on our website.

Questions

Submit questions to the host via chat. There will be plenty of time to ask questions at the end of the presentation.

Agenda



- ENERGY STAR Commercial Buildings
- Growth in Benchmarking
- Portfolio Manager Upgrade
 - ◆ Goals
 - ◆ Development & Design
 - ◆ User Research
 - ◆ A Peek Inside
 - ◆ Timeline and Next Steps

ENERGY STAR

Commercial Buildings Program



- Offers a strategic approach to energy management
- Enables building owners, managers, and tenants to save money & protect the environment
- Provides organizations with measurable information on energy savings and greenhouse gas emissions reductions from commercial buildings
- Builds on strong ENERGY STAR brand recognition
- ENERGY STAR on a building = Superior Energy Performance
- Benchmarking is only the first step

Portfolio Manager: Benchmarking & Scoring Tool



- Free, online benchmarking tool
www.energystar.gov/benchmark
- Enables you to:
 - Assess whole building energy and water consumption
 - Track changes in energy, water, GHG, and cost over time
 - Track onsite green power purchases
 - Share/report data with others
 - Create custom reports
- Provides a wide variety of metrics:
 - Energy Consumption (source, site, weather normalized)
 - Water Consumption (indoor, outdoor)
 - Greenhouse Gas Emissions (indirect, direct, total, avoided)
 - ENERGY STAR 1-100 score (available for 15 building types)

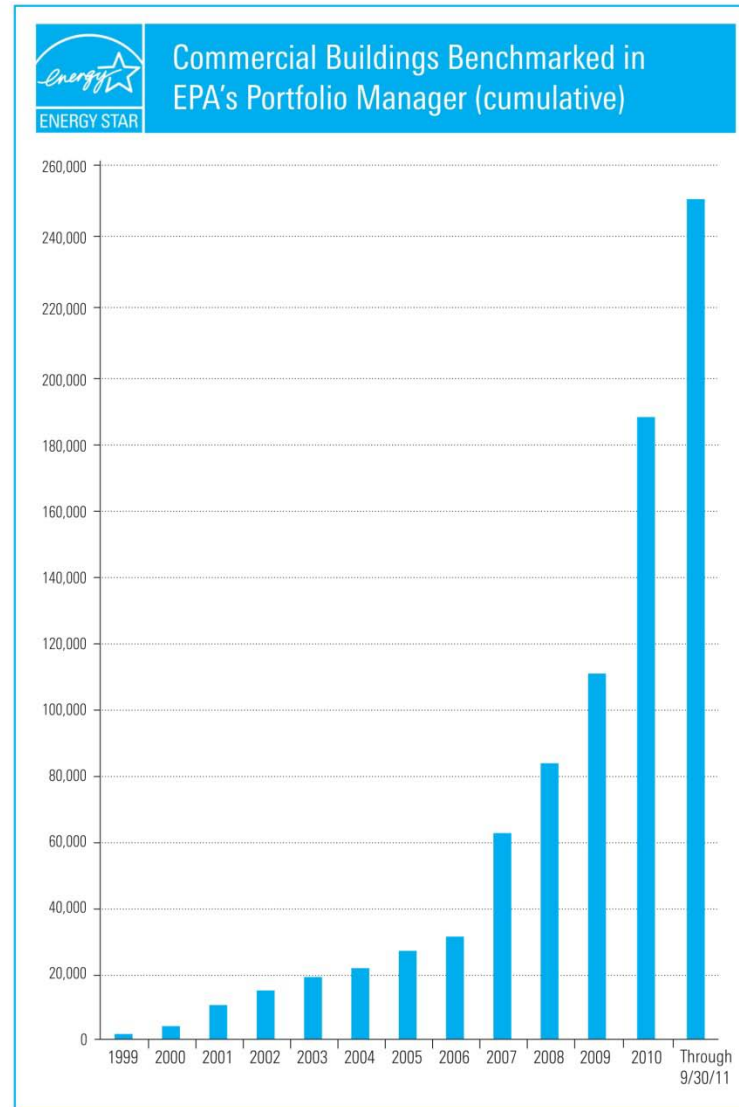
Portfolio Manager

A Common Platform



- The standard national platform for benchmarking energy in commercial buildings in the United States.
 - ◆ Tens of thousands of active accounts.
 - ◆ Used by more than 250,000 buildings, representing nearly 27 billion square feet of commercial and institutional building space in the U.S.
 - ◆ Adopted by leading commercial real estate, retail, healthcare, and educational organizations.
 - ◆ Reporting tool adopted by state and local governments for mandatory benchmarking laws
 - ◆ Required for use in buildings owned and occupied by US Federal Agencies.
- Selected by the Canadian Government as the platform for their national energy management program for existing commercial and institutional buildings

Benchmarking in Portfolio Manager Continues to Increase





Portfolio Manager Database and System Upgrade

Why Now?

- Tool launched in 2000
- Tremendous growth in usage
- Numerous enhancements over the years
- Need/opportunity to:
 - Enhance functionality
 - Increase ease of use
 - Improve processing speed
 - Assist users to improve data quality

What's Being Upgraded

Everything – Comprehensive upgrade to the entire Portfolio Manager Tool

- Database architecture

- Review how information is stored
- Optimize to account for growth in types of data that can be entered
- Develop a platform that is expandable for the future

- System processing

- Streamline methods for calculation
- Enable faster processing speeds, especially for people with large numbers of buildings
- Review hardware needs to support expanded growth

What's Being Upgraded (cont.)

- Web services (Automated Benchmarking)
 - Offer a new platform for the automatic transfer of data
 - Allow transfer by smaller “units”
 - Reduce start-up time for new providers to join
 - Make it easier to maintain
 - Transmit fewer pieces of information
- User interface
 - Overall Look/Feel
 - Streamlined data entry
 - Simpler reporting and sharing

User Research



- 190+ participants across different user segments
- Research methods
 - ◆ one-on-one interviews
 - ◆ online surveys
 - ◆ group brainstorming
 - ◆ usability testing
- Gained insights on
 - ◆ How people use the tool
 - ◆ The tool's strengths & weakness
 - ◆ The best new features to add (wish list)



User Segments Included in Research

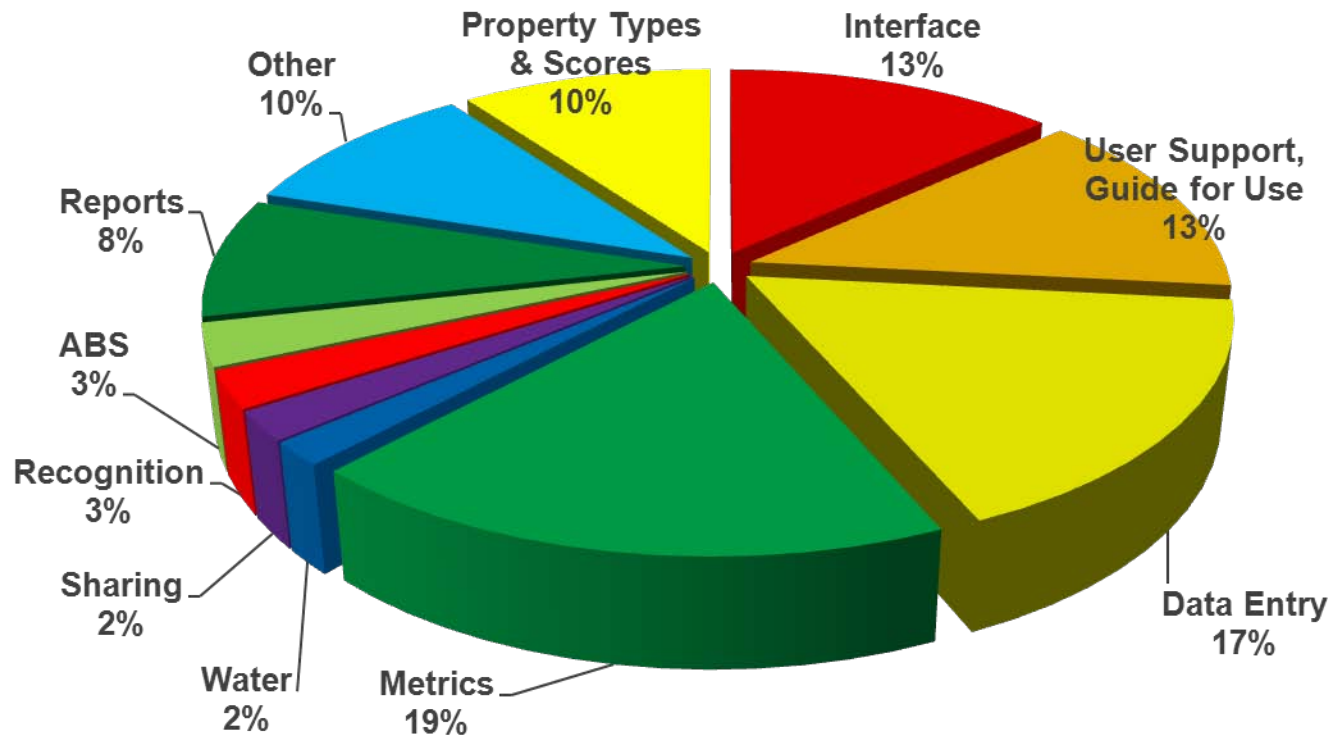


- Consulted with users who come to Portfolio Manager to:
 - ◆ Benchmark Individual Properties
 - ◆ Benchmark Large Portfolios of Properties
 - ◆ Benchmark using Automated Services
 - ◆ Benchmark Federal Buildings & Comply with Executive Orders
 - ◆ Benchmark Canadian Buildings
 - ◆ Earn/Apply for ENERGY STAR Recognition
 - ◆ Provide Automated Benchmarking Services
 - ◆ Provide Energy Services and Products
 - ◆ Run or Participate in Voluntary Campaigns
 - ◆ Run or Participate in Mandatory Legislation
 - ◆ Design New Buildings
 - ◆ Offer ENERGY STAR Training

User Research: What we heard



- Enhancement ideas were collected from all research activities and analyzed.
 - ◆ 546 total Enhancement Ideas produced 261 Unique Ideas
- Unique enhancement ideas were evaluated, prioritized and added to the list of development items for the upgrade.






A Peek Inside

Add Property Wizard

- **Your Request:** Make it more like TurboTax[®]
- **Planned Change:** Ask more leading questions about what is present to help pre-populate spaces
- **Your Request:** Incorporate more types of buildings
- **Planned Change:** Expand list of property types to choose from to allow better self- categorization

Set Up a Property: Getting Started


 Portfolio Manager

My Account: [Account Settings](#) | [Contacts Book](#) | [Help](#) | [Sign Out](#)

Portfolio Manager > Set Up a Property: Getting Started

Set Up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and, perhaps, apply for ENERGY STAR recognition!




Your Property's Primary Function

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a function

▼

[Learn more about functions](#)



Your Property's Buildings


How many physical buildings do you consider part of your property?

☐ None: My property is part of a building

☐ One: My property is a single building

☐ More than One: My property includes multiple buildings

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?



☐ Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, apply for ENERGY STAR recognition.

☐ Project: My property is in the planning stages. I will be using Portfolio Manager to estimate my ENERGY STAR scores and energy/water consumption.

Get Started!

Cancel


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Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.



Tip

If you're a pro, you may prefer to [set up your property on one page](#) or use the upload tool to [set up multiple properties with one click](#).



Add Meter Wizard – Step 1

Set Up Meters: Get Started

Portfolio Manager

Welcome, {Insert Name}: [Account Settings](#) | [Contacts Book](#) | [Help](#) | [Sign Out](#)

[Portfolio Manager](#) > [Previous Page](#) > Current Page

Get Started Setting Up Meters for Greenwood Methodist Church

Lorrem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Sources of Your Property's Energy
How does your property acquire energy? Please select all that apply.

☒ [Electricity](#)

How Many Meters?

☐ [Natural Gas](#)

☐ [Propane](#)

☐ [Fuel Oil \(No. 2\)](#)

☐ [Diesel](#)

☐ [District Steam](#)

☐ [District Hot Water](#)

☐ [District Chilled Water](#)

Don't see your energy sources?

[See More Energy Sources](#)

[Get Started!](#) [Cancel](#)

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Tip
If you're a pro, you may prefer to use the upload tool to [set up all of your meters with one click](#).

Tip
If you have a lot of meters, you may want to consider automated benchmarking services and have your energy consumption updated automatically. [Learn More](#)

- **Your Request:** Let me identify all energy types at once
- **Planned Change:** Selection of all types of fuels and number of meters on a single page for a complete picture
- **Your Request:** Keep choices more simple
- **Planned Change:** Initial list of most common types with “More” button to reveal all possible fuel types

About Your Meters

Portfolio Manager

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[Portfolio Manager](#) > [Previous Page](#) > Current Page

About Your Meters for Southside Shopping Center

Lorum ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

14 Meters for Southside Shopping Center (click table to edit)

[Add Another Meter](#) [Add](#)

<input type="checkbox"/> Meter Name	Type	Units	First Bill Date	In Use?	End Date
<input type="checkbox"/> Suite #1	Electric	kBtu (Thousand Btu)	3/1/2011	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Suite #2	Electric	kBtu (Thousand Btu)	//	<input checked="" type="checkbox"/>	//
<input type="checkbox"/> Electric Meter #3	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #4	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #5	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #6	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #7	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #8	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #9	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #10	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)
<input type="checkbox"/> Electric Meter #11	Electric	click to select units	click to provide a date	<input checked="" type="checkbox"/>	None (in use)

[Delete Meters](#)

[You can copy/paste into the table above using our \[spreadsheet template\]\(#\)](#)

[<< Back](#) [Save](#) [Continue >>](#) [Cancel](#)

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Add Meter Wizard – Step 2

- **Your Request:** Make it easy to fill in data
- **Planned Change:** New table, type-in data as you go
- **Your Request:** Simplify process for changing data
- **Planned Change:** Can easily delete or add meter if you got it wrong on the first page


Sharing Properties

- **Your Request:** Let me share with multiple people at once
- **Planned Change:** Choose multiple people and buildings on one screen
- **Your Request:** Allow more customized access
- **Planned Change:** Read/Write access can be assigned with greater granularity

← → × ↗

Sharing: Share Property(ies)

🔍


 Portfolio Manager

My Account: [Account Settings](#) | [Contacts Book](#) | [Help](#) | [Sign Out](#)

[Sharing](#) > Share Property

Share Your Property(ies)

Sometimes its really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share them with.


 1 Select Properties to Share

We'll get into the details of the level of access later. For now, which properties do you want to share?

Multiple Properties ▾

Select Properties

Selected Properties: 10

 2 Select People and/or Master Accounts to Share With

Which people or master accounts do you want to share these properties with? The access for each can be different and you'll be able to specify that on the next page.


Select contacts from my contacts book:

Anderson, Jon

Bell, Allen

Carrey, Hope

Cheshire, Max


 To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your [connected contacts](#) appear in the list.

Continue >>

Cancel


Sharing with Accounts

In order to share your property(ies), the person or organization you are sharing with must have an account in Portfolio Manager. If they do not have an account, please contact them and request that they [create an account](#) before sharing.




Set Up Automated Data Exchange



To activate automated data exchange services for your property(ies), select contacts/organizations who are [energy service providers](#). Learn more about [automated data exchange services](#).



Your Name & Email

If you share your properties with people, they must have a Portfolio Manager account. After they accept your sharing request, they will be able to see your name and e-mail address on their property page for that shared property. They will also have the option to select your name and email address to appear in their custom views. [Cancel](#) if you do not want to share any properties.



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Expanding to Canada



- Joint Cooperative Research and Development Agreement with Natural Resources Canada
- Harmonizes approach to assessing and tracking energy use in commercial buildings among the two countries.
- Canada-specific functionality to be added
 - Canadian source energy and emissions factors
 - Canadian 1-100 energy performance scales
 - Enhanced Canadian weather data
 - Metric Units
 - French language capability
- ENERGY STAR Certification will NOT be available.

Planning and Building the Upgraded Portfolio Manager



- ✓ 2010 – Conduct research
- ✓ 2011 – Requirements, design & development
- 2012 – Drawing out designs
 - Some designs completed, others in progress
 - Software development
 - Release of Automated Benchmarking Services definitions & requirements
 - Adding intuitive and simple graphic design
 - Testing software
- 2013** – Refining tool for release
 - Migrate users' data to the Upgraded Portfolio Manager

★ **Launch new Portfolio Manager** – *Planned Release: Spring 2013* ★

Between Now and Spring 2013



- Continue to benchmark and track your buildings in the current Portfolio Manager tool – all data will be transferred to the Upgraded Portfolio Manager
- Participate in quarterly update webinars to get more previews

Monitor progress at our new webpage:

www.energystar.gov/PMupgrade



Questions?

If after this webinar you have any questions on Portfolio Manager or the Upgrade, please contact buildings@energystar.gov